



Please bring the following applicable documents to your appointment. If you do not have the correct documentation we will be unable to complete your tax return.

- Photo identification for all taxpayers (ex: driver's license, passport, school ID)
- Social Security cards for all individuals on the tax return, including dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted if you do not have a Social Security number
- Birth dates for all individuals on the tax return, including dependents
- Wage and earning statements from all employers (Form W-2, W-2G, 1099-R, 1099-MISC)
- Interest and dividend statements from banks (Forms 1099-INT, 1099-DIV)
- Proof of bank account routing and account numbers for direct deposit, such as a blank check
- Forms 1095-A, B and C, Health Coverage Statements
- Health Insurance Exemption Certificate, if received
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Receipts for amount paid for daycare, including providers name, address and tax ID number
- A copy of last year's federal and state returns, if available
- Copies of income transcripts from IRS and state, if applicable
- This list is not all inclusive, more documentation may be required depending on your filing situation bring all items that may be needed and relevant.